Key Workflows in Apple CRM

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This guidance highlights the four most common workflows Business Teams use to manage their day — Tasks, Opportunities sent to SSO, Pending Quotes Needing Action, and Leads. Apple CRM allows you to view open items across these workflows on your Dashboard when you login. Review this guidance to learn how to structure your daily workflow using Apple CRM.

1 **Start your day with Tasks.**
When you start your day, view Tasks that are due and upcoming to complete the activities needed for the day. Tasks can be scheduled for any activity whether it's a customer follow up or needing to update an Opportunity. Use Tasks to manage and schedule your activities across all workflows.

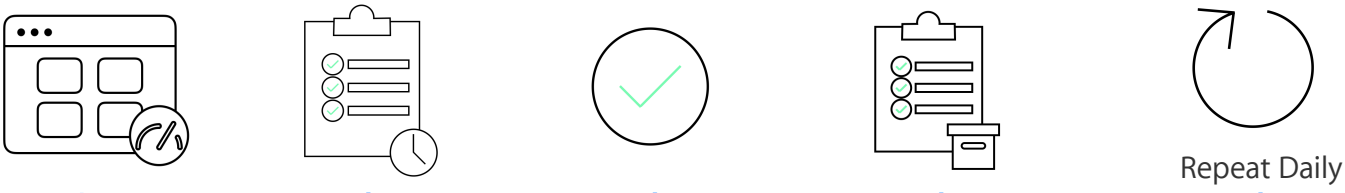
2 **Follow up on Opportunities sent to SSO and sent for Apple Approval.**
After starting your day with Tasks, you may have completed scheduled Tasks to update or address open items for Opportunities sent to SSO. For those Opportunities that you did not update through a Task, read the SSO comments and make adjustments to the Opportunity so it can be booked by SSO.

3 **Follow up on Pending Quotes Needing Action.**
You may also have completed Tasks to update any pending Quotes sent for Apple Approval that Need Action. Make adjustments to any Quotes that you did not update from a Task and need action. These Quotes can then be reviewed by the Engagement Team for Approval.

4 **Follow up on and Convert Leads.**
Now that you have followed up with customers and existing orders, it is time to meet new customers. View your Store's list of new Leads and assign or follow up on any new Leads that are not already in process.

1 Tasks

Tasks are an important way to manage customer relationships and your activities. Use Tasks as a way to plan out your upcoming activity and to help structure your day. Review the following workflow to manage your daily list of Tasks to help manage the way you engage customers.

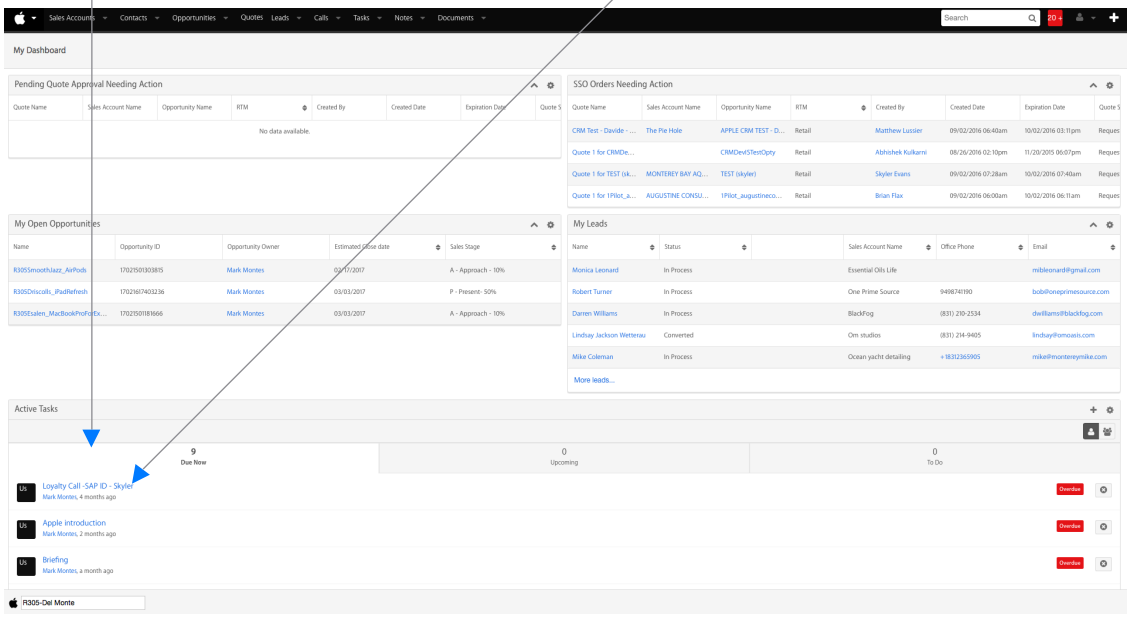


View open and upcoming Tasks on dashboard

Complete Tasks Due Now, then the Upcoming Tasks

Select the Task to see the Task View. Complete the Task

Once completed, close the Task



View the Task section of the Apple CRM Guide for details.

Need more information? View the Task section of the Apple CRM guide for detailed step by step instructions to view a list of Tasks, view a specific Task, and close a Task once completed.

2 Direct Ship (SSO) Orders Needing Action

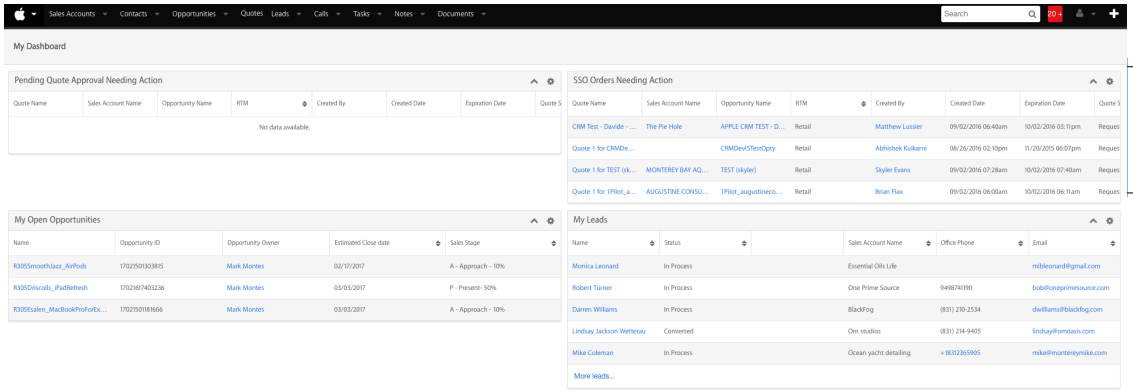
Orders that have been sent to SSO may be pushed back if they require additional documentation or other details. To ensure these orders are booked quickly, it is important to address issues with these orders so they can be booked by SSO.

View a list of SSO orders that need updates.

Select a Quote from the list that needs updating

Update Quote with needed information from SSO Notes.

Once the Quote has been updated, resubmit the Quote to the SSO team to book.


My Dashboard
Pending Quote Approval Needing Action
SSO Orders Needing Action
My Open Opportunities
My Leads
View your list of SSO Quotes Pending Action here
Select a Quote that needs action

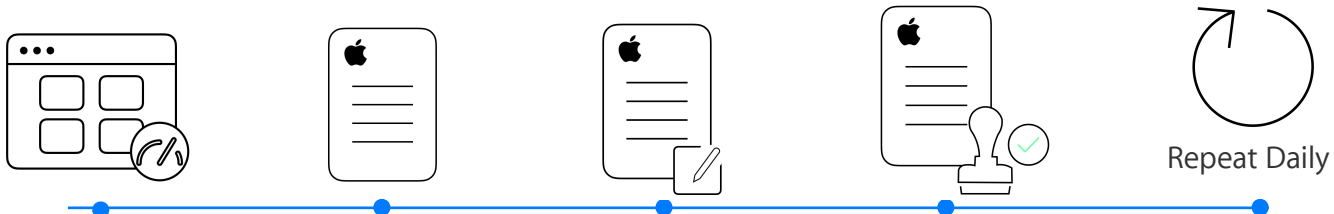
Review SSO Notes in the Notes sub-panel of the Opportunity

View the Opportunities and Quotes section of the Apple CRM Guide for details.

Need more information? View the Opportunities and Quotes section of the Apple CRM guide for instructions to view a list of SSO orders needing action, how to update a Quote, and how to submit a Quote to SSO for booking.

3 Pending Quote Approval Needing Action

Orders that have been submitted for Apple Approval may be pushed back if they are missing Opportunity Engagement notes, need adjustments to pricing, or other additional details. To ensure these orders are booked quickly, address the issues with these Quotes quickly so they can be reviewed and approved.



View

View list of Quotes pending Approval that need action

Select

Select a Quote from the list that needs action

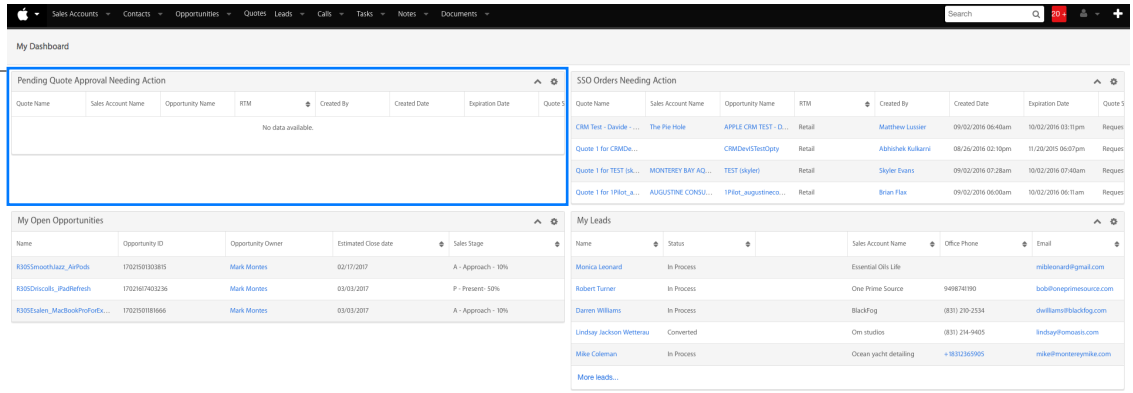
Update

Update Quote with information based on comments.

Resubmit

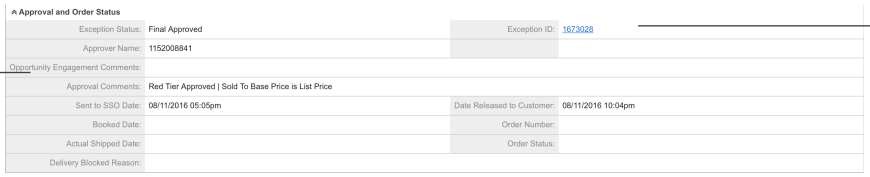
Once the Quote has been updated, resubmit the Quote

View your list of Pending Quotes Needing Action here



Review Engagement Team comments in the Quote detail view

View the most recent approval comment on the Quote


Approval and Order Status
Exception Status: Final Approved
Exception ID: 1673028
Approver Name: 1152008841
Opportunity Engagement Comments:
Approval Comments: Red Tier Approved | Sold To Base Price is List Price
Sent to SSO Date: 08/11/2016 05:05pm
Date Released to Customer: 08/11/2016 10:04pm
Booked Date:
Order Number:
Actual Shipped Date:
Order Status:
Delivery Blocked Reason:

Select an Exception ID to view the approval

View the Opportunities and Quotes section of the Apple CRM Guide for details.

Need more information? View the Opportunities and Quotes section of the Apple CRM guide for detailed step by step instructions to view a list of how to update a Quote, and how to submit a Quote for Apple Approval.

4 Leads

Introductions made in Store or Online are brought in as Leads to Apple CRM. Following up on Leads is the start of new Relationships and allows you to meet new customers.

View

Select Leads module to view the Leads List View

Filter

Filter list to Leads with New Status and created in prior 7 days

Follow Up or Assign

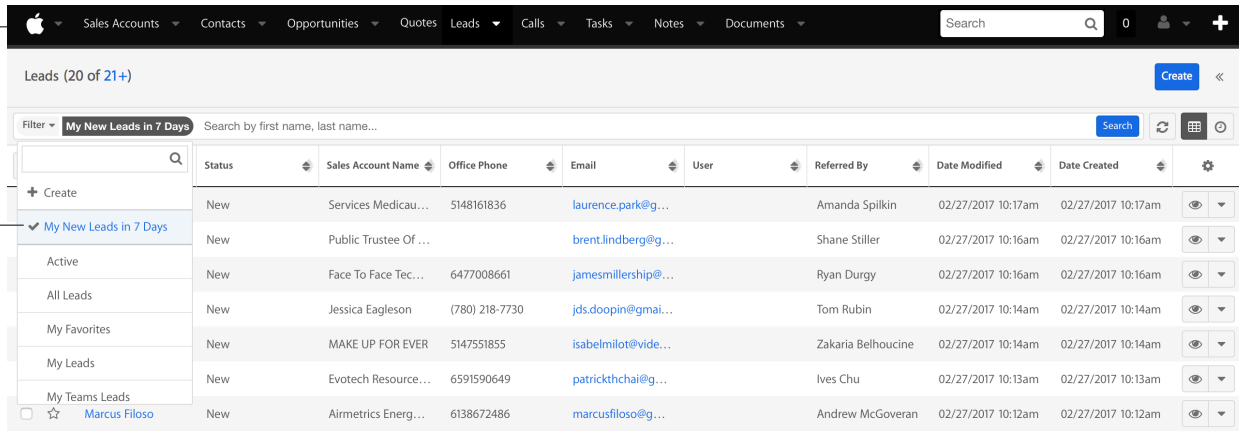
Follow up with each New Lead or Assign each New Lead to a team member

Convert or Archive

Once followed up, Convert the Lead if next steps are identified or archive the Lead

View your list of Leads by selecting the Leads module in the Tool Bar

Select a filter to view Leads with New status in prior 7 days



Once editing a Lead, search and find a User here

Follow up by selecting the down arrow here and select Edit

View the Leads section of the Apple CRM Guide for details.

Need more information? View the Leads section of the Apple CRM guide for detailed step by step instructions to view a list of Leads, filtering a list, and converting or assigning a Lead.